5   CASE MANAGEMENT

The case management page is used to enter and maintain information regarding ongoing involvement between APS and a specific client. The case management page can be accessed by clicking the [Case Management] button on the bottom of the referral detail page. You can access the case management page for an existing case using the [___ Case No] field and button or by selecting a specific case from your caseload or workload page.

The case management page contains five sections: main details, narrative summary, case assessment, case disposition and bottom buttons.

NOTE: Remember - you can navigate to each section throughout the case management page by using the page navigation button on the navigation menu.

5.1   MAIN DETAILS SECTION

The main details section of the case management page looks like this:

5.1.1   CASE NUMBER

The case number field [___] is not enterable. This field will display the case number that was assigned by the system when a new case management is saved.

5.1.2   CLIENT NAME

The client name field [DAVE SMITH] is not enterable. When a case is initiated from the referral detail page, this field will default the name of the victim from the referral.
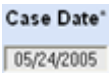
5.1.3 PERSON ID

The person ID field [Person ID | 181 | Detail] is not enterable. This field will default the person ID of the victim from the referral.

5.1.4 DETAIL BUTTON

Clicking the [Detail] button, associated to the person ID field, will take you to the person detail page for the client. This will enable you to view the client's demographic information, telephone numbers, tribal affiliations, provider information, insurance information, legal information, associated persons and attached files.

5.1.5 CASE DATE

The case date field [Case Date* | 05/24/2005] will default to the current date when a case is being opened but can be modified to a past date, if necessary. Once a case has been saved, the case date can only be modified by your supervisor or Central Office staff.

5.1.6 CASE COUNTY

You can use the case county drop down list [Case County* | LEWIS & CLARK ▼] to select the county where the case is located.

5.1.7 ACUITY LEVEL

The acuity level field [Acuity Level |] is not enterable. This field will default the acuity level determined by the system when a case management acuity assessment is completed. Case management acuity must be completed within 30 days of the case date and updated on a yearly basis.

5.1.8 CLIENT TYPE

You can use the client type check boxes ☐ to indicate the type of client on the case. Multiple types can be selected. For example, the client could be elderly and disabled. The system will not allow a type of ELDERLY unless the client is at least 60 years of age.

5.1.9 ASSIGNED WORKER

The assigned worker field [Assigned Worker | Worker Reynolds] is not enterable. This field will default the name of the worker that is opening the case. The assigned worker can be changed by clicking the [Assignment Detail] button.

5.1.10 ASSIGNMENT DETAIL BUTTON

Clicking the ▢ Assignment Detail button will take you to the assignment detail page for the case. The assignment detail page enables you to transfer the case to another worker. The assignment detail page looks like this:

Case Number 34 Assignment Detail

Assignment History

Assigned Worker	Assigned By	Assignment Date	End Date
REYNOLDS, MARY C	REYNOLDS, MARY C	05/25/2005	
MARKS, JAY H	REYNOLDS, MARY C	05/25/2005	05/25/2005
REYNOLDS, MARY C	REYNOLDS, MARY C	05/24/2005	05/25/2005

Change Assigned Worker ▼

Print Back Save

5.1.10.1 Assigned Worker

Assigned Worker

The assigned worker field VANDERMARS, TOM is not enterable. This field will display the names of all workers that have been assigned to the case. The most recent assigned worker will be at the top of the list.

5.1.10.2 Assigned By

Assigned By

The assigned by field PSA_WEB_USER is not enterable. This field will display the name of the worker that transferred the case to the assigned worker.

5.1.10.3 Assignment Date

Assignment Date

The assignment date field 04/28/2005 is not enterable. This field will display the date that the assigned worker was assigned to the case.

5.1.10.4 End Date

End Date

The end date field is not enterable. This field will display the date that the previous worker was released as the assigned worker for the case.

5.1.10.5 Change Assigned Worker

You can transfer the case to another worker using the change assigned worker drop down list.

Change Assigned Worker ▼ All APS workers will be available on the list and when you select another worker and click the Save button, the new worker (and their supervisor) will receive an alert. The assignment detail page will also be updated with the new assignment history.

5.1.10.6 Print Button

Clicking the Print button will print the assignment detail page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the assignment detail page.

5.1.10.7 Back Button

Clicking the Back button will take you back to the case management page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.1.10.8 Save Button

Clicking the Save button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

5.2   PERSON OF INTEREST SECTION

The person of interest section of the case management page looks like this:

Person of Interest					
Person ID	First Name	MI	Last Name	SSN	Relation to Client
38721	EDWARD		EGGLAND		Other

Delete Person of Interest   Add Person of Interest   Detail   History

NOTE: Person of interest details will display in reverse chronological order with the most recently added person of interest listed first.

5.2.1   SELECT RADIO BUTTON

The select radio button ○ is used to select an individual person of interest record. You must use the select radio button in order to delete a person of interest record, or to view the detail or the history for that person of interest.

5.2.2   PERSON ID

The person ID field [Person ID | 38564] is not enterable. This field will display the person ID of the person of interest.

5.2.3   FIRST NAME

The first name field [First Name | MARY] is not enterable. This field will display the first name of the person of interest.

5.2.4   MI

The middle initial field [MI | V] is not enterable. This field will display the middle initial of the person of interest.

5.2.5   LAST NAME

The last name field [Last Name | REYNOLDS] is not enterable. This field will display the last name of the person of interest.

5.2.6   SSN

The middle initial field [SSN | 429-75-1234] is not enterable. This field will display the middle initial of the person of interest.

5.2.7   RELATION TO CLIENT

You can use the relation drop down list [Relation to Client | Other ▾] to select the relationship of the person of interest to the person on the detail page. When a person of interest is selected from person search results or person detail, the relation will default to OTHER.

5.2.8   DELETE PERSON OF INTEREST BUTTON

Clicking the [Delete Person of Interest] button will delete the selected associated person from the person detail page. Before clicking the delete associated person button, you must first select an associated person by clicking the appropriate select radio button.

5.2.9   ADD PERSON OF INTEREST BUTTON

Clicking the [Add Person of Interest] button will take you to the person search page (see Section 4.1). From the person search results page, you can either select an existing person or add a new person to the system and then add them as a person of interest.

5.2.10   DETAIL BUTTON

Clicking the [Detail] button will take you to the person detail page for the person of interest. Before clicking the person detail button, you must first select a person of interest by clicking the appropriate select radio button.

5.2.11   HISTORY BUTTON

Clicking the [History] button will take you to the person on interest hisotry page for the person of interest. Before clicking the person detail button, you must first select a person of interest by clicking the appropriate select radio button.

5.3   NARRATIVE SUMMARY SECTION

The narrative summary section of the case management page looks like this:

NOTE: Narrative Summary details will display in reverse chronological order with the most current narrative summary listed first.

5.3.1   SELECT RADIO BUTTON

The select radio button ⊙ is used to select an individual narrative summary record. You must use the select radio button in order to delete a narrative summary record from the case management page.
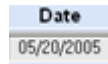
5.3.2   ENTERED BY

Entered By

PSA_WEB_USER

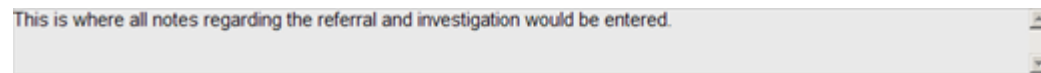The entered by field [PSA_WEB_USER] is not enterable. This field will display the name of the worker that added the notes. Any APS worker will have the ability to add notes to your case, so this field will enable you to easily identify the worker that added the notes.

5.3.3   DATE

Date

05/20/2005
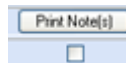
The date field [05/20/2005] is not enterable. This field will display the date the notes were added to the case.

5.3.4   NOTES

This is where all notes regarding the referral and investigation would be entered.

The notes box is a free-form text box where you can enter the narrative summary notes. Notes can be added at any time. Once the notes have been stored, only supervisors and Central Office staff will have the authority to modify notes on a case.

5.3.5   PRINT NOTE BUTTON AND CHECK BOX

Print Note(s)

☐

The print note button and check box enable you to select a specific note (or notes) to print.

5.3.6   DELETE NOTE BUTTON

Delete Note

Clicking the [Delete Note] button will delete the selected narrative summary notes from the referral detail page. Before clicking the delete note button, you must first select a narrative summary note by clicking the appropriate select radio button.

NOTE: Only supervisors and Central Office staff will have the authority to delete notes from a case.

5.3.7   ADD NOTE BUTTON

Add Note

Clicking the [Add Note] button will take you to the add page where narrative summary notes can be entered. The 'add narrative summary' page looks like this:

Add Narrative Summary for Referral 27206 (LEONA V GARNICK)

Notes*	Entered By	Date
	TEST WORKER2	08/12/2010

Print   Back   Save

NOTE: Notes can continue to be entered after case disposition.
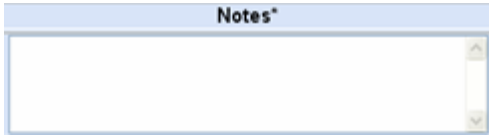
5.3.7.1   Entered By

The entered by field [Entered By PSA_WEB_USER] is not enterable. This field will default the name of the worker that is adding the narrative summary notes to the case.

5.3.7.2   Date

The date field [Date 05/20/2005] is not enterable. This field will default the date the narrative summary notes are being entered.

5.3.7.3   Notes

The notes box [Notes*] is a free-form text box where narrative summary notes can be entered.

5.3.7.4   Back Button

Clicking the Back button will take you back to the case management page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.3.7.5   Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the

'add narrative summary page' so you can enter more notes for the case, if necessary. If you do not need to add more notes, click the ⬚Back button to return to the case management page.

5.4   CASE ASSESSMENT SECTION

The case assessment due date will be based on the case date. While you will be required to complete a case assessment at least once a year, you can complete an assessment at any time, if the circumstances of the case change and new case assessment criterion is necessary.

The case assessment section of the case management page looks like this:

5.4.1   INTERVENTION ASSESSMENT CRITERIA

The intervention assessment criteria field [Imminent Risk Has Been Eliminated] is not enterable. This field will display the intervention assessment criteria that was selected on the add page.

5.4.2   DATE PERFORMED

The date performed field [05/12/2005] is not enterable. This field will display the date the intervention assessment criteria was entered on the add page.

5.4.3   ADD ASSESSMENT BUTTON

Clicking the [Add Assessment] button will take you to the add page where intervention criteria can be selected for a case. The add assessment page looks like this:

Add Assessment for Case 34

Intervention Assessment Criteria*	**Date Performed**
Choose Intervention Assessment Criteria ▾	05/28/2005

Back Save

5.4.3.1   Intervention Assessment Criteria

You can use the intervention assessment criteria drop down list
to select the appropriate assessment criteria for the case.

Intervention Assessment Criteria*
Choose Intervention Assessment Criteria ▾

5.4.3.2   Date Performed

Date Performed
The date performed field   05/23/2005   is not enterable. This field will default to the date the
intervention assessment is being added.

5.4.3.3   Back Button

Clicking the Back button will take you back to the case management page. If you have made
any changes to the page, you will receive a message asking if you would like to save the
information before returning to the case management page.

5.4.3.4   Save Button

Clicking the Save button will save the additions you have made to the page. Once the
information has been saved, you will receive a confirmation message. You will remain on the
add assessment page. Click the Back button to return to the case management page.

5.5   CASE DISPOSITION SECTION

Once a case is dispositioned, the case management details will be locked for the worker role. At
that time, changes to the case management details can only be made by someone with a
supervisor role. The same is true once the case disposition has been approved by the supervisor.

The case disposition section of the case management page looks like this:
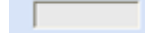
Case Disposition

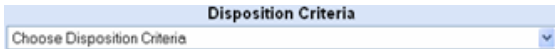| **Disposition Date**	**Disposition Criteria**		
	Choose Disposition Criteria ▾		
Dispositioned By	**Approved By Supv**	**Approving Supervisor**	**Approval Date**
	☐		

NOTE: You will not be able to disposition a case if the case acuity level has not been approved by your supervisor or if there are any open services.

5.5.1   DISPOSITION DATE
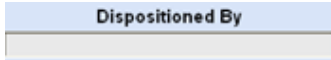
The disposition date field [Disposition Date field] is not enterable. This field will default the date the case disposition criteria was selected and saved.

5.5.2   DISPOSITION CRITERIA

You can use the disposition criteria drop down list [Disposition Criteria dropdown: Choose Disposition Criteria] to select the appropriate case disposition criteria.

5.5.3   DISPOSITIONED BY

The dispositioned by field [Dispositioned By field] is not enterable. This field will default the name of the worker that dispositioned the case.
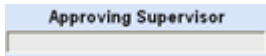
5.5.4   APPROVED BY SUPERVISOR

As a supervisor, you can check the [Approved by Supervisor checkbox] box if you agree with the case disposition criteria and would like to approve the case for closure. If you are entering the case disposition criteria as a supervisor, Central Office can approve the case for closure at the supervisor level.
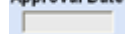
5.5.5   APPROVING SUPERVISOR

The approving supervisor field [Approving Supervisor field] is not enterable. This field will default the name of the supervisor that approved the case for closure.

5.5.6   APPROVAL DATE

The approval date field [Approval Date field] is not enterable. This field will default the date the supervisor approved the case for closure.

5.6   CASE MANAGEMENT BOTTOM BUTTONS

There are several buttons located at the bottom of the case management page.

[Buttons: Delete This Case | Acuity Assessment | Court Actions | Services | Medicaid | Save Case Management]

The functionality for each of these buttons is as follows:

5.6.1   DELETE THIS CASE BUTTON

Clicking the [Delete This Case] button will delete the case from the OPM system. All information associated to the case management page will be deleted. This function enables workers to have duplicate cases, or cases that were opened in error, removed from the system.

NOTE: Only supervisors and Central Office staff will have the authority to delete a case from the system.

5.6.2   ACUITY ASSESSMENT BUTTON

Clicking the [Acuity Assessment] button will take you to the acuity assessment page where the acuity level can be set for the case. The acuity level must be set within 30 days of the case date, and you will be required to submit an updated case management acuity assessment at least once a year. While you will be required to update the case acuity level at least once a year, you can complete an assessment at any time if the circumstances of the case change.

The acuity assessment page contains ten factors and a results/approval section. Total acuity points are calculated based on your selection for each factor (a selection is required for each factor.) Sections 1 – 7 measure risk and sections 8 – 10 measure workload. Factor points range from 1 – 5 for factors 1 through 9 and 5 – 25 for factor 10. Total points of 14 – 32 will set an acuity level of 1, total points of 33 – 51 will set an acuity level of 2, and total points of 52 – 70 will set an acuity level of 3 for the case.

The name of the client on the case will display at the top of the acuity assessment page so you (and the approving supervisor) can identify who the acuity is being completed for.

NOTE: Remember - you can navigate to each section throughout the acuity assessment page by using the page navigation button on the navigation menu.

5.6.2.1   Cognitive/Mental Health Capabilities

The cognitive/mental health capabilities section of the acuity assessment page looks like this:

Cognitive/Mental Health Capabilities
○ Cognitively intact and/or no observable mental illness.
○ Mild cognitive impairment and/or mental illness.
○ Moderate or episodic cognitive impairment and/or mental illness.
○ Moderate to severe cognitive impairment and/or mental illness.
○ Severe cognitive impairment and/or mental illness.
[ ] **Sub Total**

Click the radio button ○ next to the appropriate level of cognitive/mental health capabilities for the victim on the case.

5.6.2.2   Physical Capabilities

The physical capabilities section of the acuity assessment page looks like this:

Physical Capabilities
○ No physical impairment.
○ Mild physical impairment and minimal assistance needed.
○ Moderate or episodic physical impairment and moderate assistance needed.
○ Moderate to severe physical impairment and substantial assistance needed.
○ Severe physical impairment and total assistance needed.
[ ] **Sub Total**

Click the radio button ○ next to the appropriate level of physical capabilities for the victim on the case.

5.6.2.3   Physical Environment

The physical environment section of the acuity assessment page looks like this:

Physical Environment
○ Adequate. No pertinent physical environment concerns.
○ Acceptable but slightly soiled and/or cluttered.
○ Functioning utilities but moderately soiled, cluttered, odorous and/or in need of minor repairs.
○ Limited utilities, very soiled, cluttered, unsanitary and/or in need of major repairs.
○ Lack of utilities, filthy, unsound, unhealthy, unsafe and/or is non repairable. Homeless and community shelter is unavailable. Alternate housing is necessary.
[ ] **Sub Total**

Click the radio button ○ next to the appropriate description of the physical environment for the victim on the case.

5.6.2.4   Ability to Function in Environment

The ability to function in environment section of the acuity assessment page looks like this:

Ability to Function in Environment
- The client, caregivers and/or supports are meeting 100% of the care needs.
- The client, caregivers and/or supports are meeting 75% to 100% of the care needs.
- The client, caregivers and/or supports are meeting 50% to 75% of the care needs.
- The client, caregivers and/or supports are meeting 25% to 50% of the care needs.
- The client, caregivers and/or supports are meeting less than 25% of the care needs.

Sub Total

Click the radio button ⊙ next to the appropriate description of the victim's ability to function in their environment.

5.6.2.5   Nature/Severity of A, N, E

The nature/severity of A, N, E section of the acuity assessment page looks like this:

Nature/Severity of A,N,E
- No discernable effect on the client.
- Minimal effect on the client.
- Moderate effect on the client.
- Moderate to severe effect on the client.
- Severe effect on the client.

Sub Total

Click the radio button ⊙ next to the level of abuse, neglect or exploitation for the client.

5.6.2.6   Risk from Person of Interest (POI)/Risk to Self

The risk from person of interest (POI)/risk to self section of the acuity assessment page looks like this:

Risk From Person of Interest (POI) / Risk to Self
- No risk to the client.
- Minimal risk to the client.
- Moderate risk to the client.
- High risk to the client.
- Severe risk to the client.

Sub Total

Click the radio button ⊙ next to the appropriate level of risk between the person(s) indicated as the person(s) of interest on the referral and the client on the case, as well as the risk of the victim to themselves.

5.6.2.7   Financial Issues

The financial issues section of the acuity assessment page looks like this:

Financial Issues
- ○ No pertinent financial concerns.
- ○ Limited but adequate financial resources. Independently able to protect and properly manage financial resources. All needs are met.
- ○ Unknown financial resources. Lack of cooperation or marginal ability to protect and properly manage financial resources. Most needs are met.
- ○ Inadequate financial resources. Questionable ability to protect and properly manage financial resources. Some needs are met.
- ○ Inaccessible or no financial resources. Inability to protect and properly manage financial resources. Few needs are met.

Sub Total

Click the radio button ○ next to the appropriate amount of financial issues for the victim on the case.

5.6.2.8   Case Intensity

The case intensity section of the acuity assessment page looks like this:

Case Intensity
- ○ Referral / Case causes no disruption to other required activities.
- ○ Referral / Case causes slight disruption to other required activities.
- ○ Referral / Case causes moderate disruption to other required activities.
- ○ Referral / Case causes serious disruption to other required activities.
- ○ Referral / Case causes immediate disruption to other required activities.

Sub Total

Click the radio button ○ next to the appropriate potential for disruption to other required activities caused by this case.

5.6.2.9   Worker Safety

The worker safety section of the acuity assessment question page looks like this:

Worker Safety
- ○ No risk to workers safety and/or health.
- ○ Minimal risk to workers safety and/or health.
- ○ Moderate risk to workers safety and/or health.
- ○ High risk to workers safety and/or health.
- ○ Severe risk to workers safety and/or health.

Sub Total

Click the radio button ○ next to the appropriate worker safety considerations for the case.

5.6.2.10 Time Expectation

The time expectation section of the acuity assessment page looks like this:

Click the radio button ⊙ next to the appropriate number of expected hours of worker involvement for the case.

5.6.2.11 Acuity Assessment Results

The acuity assessment results section of the acuity assessment page looks like this:

5.6.2.11.1 Acuity Points

The acuity points field is not enterable. This field will default the accumulative points from each of the ten factors listed on the acuity assessment page.

5.6.2.11.2 Acuity Level

The acuity level field is not enterable. This field will default the appropriate acuity level based on the total acuity points.

5.6.2.11.3 Submitted By

The submitted by field is not enterable. This field will default the name of the worker that submitted the acuity assessment.

5.6.2.11.4 Date Submitted

The date submitted field [Date Submitted] is not enterable. This field will default the date the worker submitted the acuity assessment for approval.

5.6.2.11.5 Approved by Supervisor

As a supervisor, you can check the [Approved by Supervisor ☐] box if you agree with the worker's acuity assessment and would like to approve the acuity assessment. If you are submitting the acuity assessment as a supervisor, Central Office can approve the acuity assessment at the supervisor level. Once the acuity assessment has been completed, the acuity level cannot be changed. If circumstances of the case necessitate a change in acuity level, then a new acuity assessment must be completed and submitted for approval.

5.6.2.11.6 Approving Supervisor

The approving supervisor field [Approving Supervisor] is not enterable. This field will default the name of the supervisor that approved the acuity assessment.

5.6.2.11.7 Approval Date

The approval date field [Approval Date] is not enterable. This field will default the date the supervisor approved the acuity assessment.

5.6.2.12 Acuity Assessment Bottom Buttons

5.6.2.12.1 History Button

Clicking the [History] button will take you to the acuity assessment history page for the case. The acuity assessment history page will display a list of all acuity assessments that have been completed and approved for the case. See section 7.4 for additional information on viewing acuity assessment history for a case.

5.6.2.12.2 Print Button

Clicking the [Print] button will print the acuity assessment page. A print window will open where you can confirm your print details. If everything is correct, click the [Print] button on the print window. Click the [Cancel] button on the print window if you do not wish to print the acuity assessment page.

5.6.2.12.3 Back Button

Clicking the [Back] button will take you back to the case management page. If you have made any additions to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.6.2.12.4 Save Button

Clicking the Save button will save your acuity assessment results and an alert will be sent to your supervisor requesting approval. The system will not allow you to save your assessment until all factors have a radio button selected.

5.6.3   COURT ACTIONS BUTTON

Clicking the Court Actions button will take you to the court actions page. The court actions page looks like this:

5.6.3.1   Select Radio Button

The select radio button ○ is used to select an individual court action record. You must use the select radio button in order to generate the annual report and petition approval, or to delete a court action record from the court actions page.

5.6.3.2   Action Initiated Date

The action initiated date field **Action Init Dt** 06/01/2005 will display the action initiated date that was entered on the add page. Once an action has been added, the action initiated date can be entered or modified directly on the court actions page.

5.6.3.3   Action Filed Date

The action filed date field **Act Filed Dt** 06/05/2005 will display the action filed date that was entered on the add page. Once an action has been added, the action filed date can be modified directly on the court actions page.

5.6.3.4   Cause Number

The cause number field [Cause No. JD01-101] will display the cause number that was entered on the add page. Once an action has been added, the cause number can be entered or modified directly on the court actions page.

5.6.3.5   County

The county field [County LEWIS & CLARK] will display the county that was selected on the add page. Once an action has been added, the county can be entered or modified directly on the court actions page.

5.6.3.6   Judicial District

The judicial district field [Judicial District 1] is not enterable. The judicial district will be defaulted by the system based on the county that was selected on the add page.

5.6.3.7   Court Action

The court action field [Court Action* Guardianship/Conservatorship] will display the court action that was selected on the add page. Once an action has been added, the court action can be modified directly on the court actions page.

5.6.3.8   Guardianship Type

The guardianship type field [Guardianship Type Permanent Full] is not enterable. The guardianship type will be defaulted based on the selection made on the add page. Once an action has been added, you can modify the guardianship type directly on the court actions page by clicking the [Set] button.

5.6.3.9   Set Button

Clicking the [Set] button enables you to change the type of guardianship/conservatorship, once a court action has been added.

5.6.3.10   Court Disposition

The court disposition field [Court Disposition Civil Order Entered] will display the court disposition that was selected on the add page. Once an action has been added, the court action can be modified directly on the court actions page.

5.6.3.11   End Date

The end date field [End Date] is not enterable. If temporary guardianship is selected as the guardianship type on the add page, the end date will default to six months from the court order date.

5.6.3.12 Court Order Date

The court order date [06/08/2005] will display the court order date that was entered on the add page. Once an action has been added, the court order date can be entered or modified directly on the court actions page.

5.6.3.13 Jurisdiction Type

The jurisdiction type field [State District Court] will display the jurisdiction type that was selected on the add page. Once an action has been added, the jurisdiction type can be modified directly on the court actions page.

5.6.3.14 Review Date

The review date field [05/01/2005] will display the review date that was entered on the add page. Once an action has been added, the review date can be entered or modified directly on the court actions page.

5.6.3.15 Annual Report Due Date

The annual report due date field [05/01/2006] is not enterable. If permanent guardianship is selected as the guardianship type on the add page, the annual report due date will default to twelve months from the court order date.

5.6.3.16 Restitution Amount

The restitution amount field [   ] will display the restitution amount that was entered on the add page. Once an action has been added, the restitution amount can be entered or modified directly on the court actions page.

5.6.3.17 Legal Counsel

The legal counsel area provides four free-form text fields for you to enter information regarding department, adverse party, other counsel and conservator.

Legal Counsel			
Department	Adverse Party	Other Counsel	Conservator

5.6.3.18 Comments

The comments box [Comments] is a free-form text box. This box will display comments that were entered on the add page. Once an action has been added, the comments can be entered or modified directly on the court actions page.

5.6.3.19 Delete Action

Clicking the [Delete Action] button will delete the selected court action from the court actions page. Before clicking the delete action button, you must first select an action by clicking the appropriate select radio button.

5.6.3.20 Add Action Button

Clicking the [Add Action] button will take you to the add page for court action information. The 'add new court action' page looks like this:

5.6.3.20.1 Action Initiated Date

The action initiated date field [Action Init Dt] is where you can enter the date you (APS) filed the action with the County Attorney.

5.6.3.20.2 Action Filed Date

The action filed date field [Act Filed Dt] is where you can enter the date the County Attorney filed the action with the court.

5.6.3.20.3 Cause Number

The cause number field [JD01-101] is where you can enter the number that was assigned to the case by the court.

5.6.3.20.4 County

You can use the county drop down list [LEWIS & CLARK] to select the county where the court action occurred.

5.6.3.20.5 Judicial District
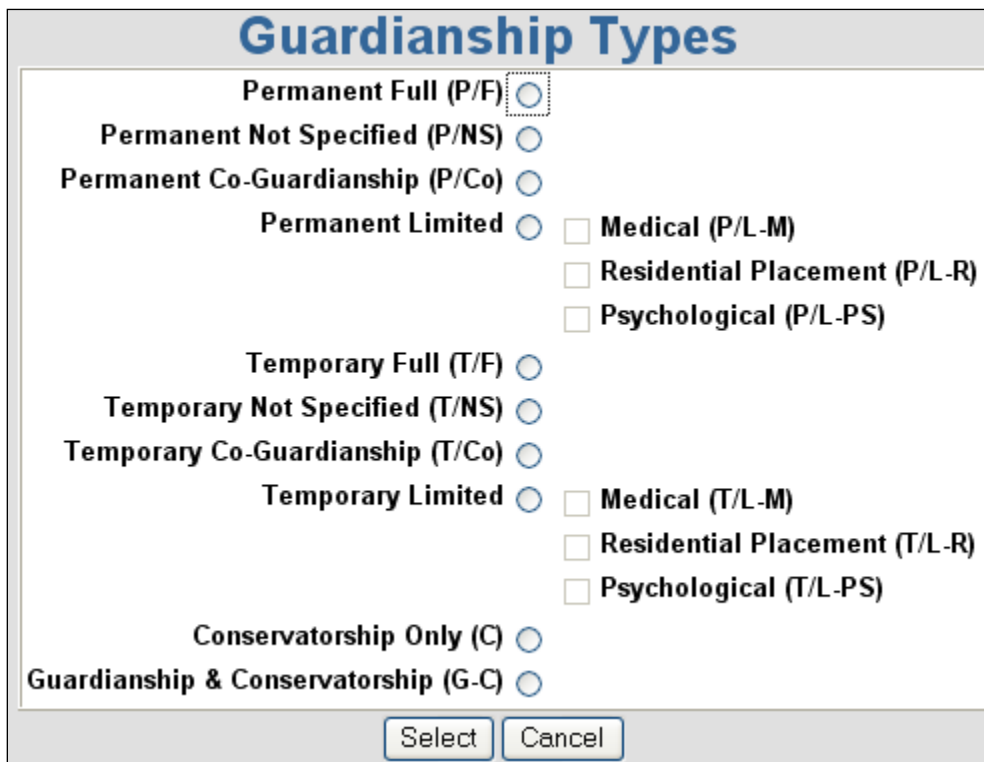
The judicial district field **Judicial District** `1` is not enterable. The judicial district will be defaulted by the system based on the county that was selected.

5.6.3.20.6 Court Action

You can use the court action drop down list **Court Action*** `Guardianship/Conservatorship` to select the type of court action that took place on behalf of the client.

5.6.3.20.7 Guardianship Type

The guardianship type field **Guardianship Type** `Permanent Full` is not enterable. When a court action of guardianship/conservatorship is selected from the court action drop down list, a pop-up window will display listing the valid guardianship/conservatorship types. The window that will display looks like this:

Guardianship Types

Permanent Full (P/F) ○
Permanent Not Specified (P/NS) ○
Permanent Co-Guardianship (P/Co) ○
Permanent Limited ○
  ☐ Medical (P/L-M)
  ☐ Residential Placement (P/L-R)
  ☐ Psychological (P/L-PS)

Temporary Full (T/F) ○
Temporary Not Specified (T/NS) ○
Temporary Co-Guardianship (T/Co) ○
Temporary Limited ○
  ☐ Medical (T/L-M)
  ☐ Residential Placement (T/L-R)
  ☐ Psychological (T/L-PS)

Conservatorship Only (C) ○
Guardianship & Conservatorship (G-C) ○

[Select] [Cancel]

To select a type, click the radio button ○ next to the appropriate guardianship type. For 'permanent limited' and 'temporary limited', there are also check boxes ☐ to indicate the limitations of the guardianship. You can check multiple check boxes, if necessary. Clicking the **Select** button will return your selection(s) back to the add page. Clicking the **Cancel** button will take you back to the add page, but no guardianship types will be selected.

5.6.3.20.8 Set Button

Once you have selected a guardianship type, clicking the Set button enables you to change the type of guardianship/conservatorship.
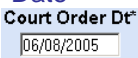
5.6.3.20.9 Court Disposition

You can use the court disposition drop down list to select the court disposition for the court action.

5.6.3.20.10 End Date

The end date field is not enterable. If temporary guardianship is selected as the guardianship type, the end date will default to six months from the court order date.

5.6.3.20.11 Court Order Date

The court order date 06/08/2005 is where you can enter the effective date of the court order.

5.6.3.20.12 Jurisdiction Type

You can use the jurisdiction type drop down list State District Court to select the type of jurisdiction for the court action.
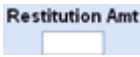
5.6.3.20.13 Review Date

The review date field 05/01/2005 is where you can enter the date of the next court review.

5.6.3.20.14 Annual Report Due Date

The annual report due date field 05/01/2006 is not enterable. If permanent guardianship is selected as the guardianship type, the annual report due date will default to twelve months from the court order date.

5.6.3.20.15 Restitution Amount

The restitution amount field is where you can enter the amount of any court ordered restitution.

5.6.3.20.16 Legal Counsel
The legal counsel area provides four free-form text fields for you to enter information regarding Department, Adverse Party, Other Counsel and Conservator.

| Legal Counsel			
Department	Adverse Party	Other Counsel	Conservator

5.6.3.20.17 Comments

The comments box [Comments [   ]] is a free-form text box where you can enter general comments regarding the court action.
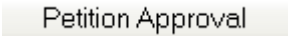
5.6.3.20.18 Back Button

Clicking the [Back] button will take you back to the court actions page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the court actions page.

5.6.3.20.19 Save Button

Clicking the [Save] button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the 'add new court action page' so you can enter another court action, if necessary. If you do not need to add another court action, click the [Back] button to return to the court actions page.

5.6.3.21 Petition Approval Button

Clicking the [Petition Approval] button will open the Petition for Approval of Annual Account of Guardian/Conservator document. See section 7.2.3 for additional information regarding the Petition for Approval of Annual Account of Guardian/Conservator.

5.6.3.22 Annual Report Button

Clicking the [Annual Report] button will open the Annual Account of Guardian Report document. See section 7.2.2 for additional information regarding the Annual Account of Guardian Report.

5.6.3.23 Print Button

Clicking the [Print] button will print the court actions page. A print window will open where you can confirm your print details. If everything is correct, click the [Print] button on the print window. Click the [Cancel] button on the print window if you do not wish to print the court actions page.

5.6.3.24 Back Button

Clicking the [Back] button will take you back to the case management page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.6.3.25 Save Button

Clicking the [Save] button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

5.6.4   SERVICES BUTTON

Clicking the [Services] button will take you to the services page. The services page looks like this:

5.6.4.1   Select Radio Button

The select radio button ○ is used to select an individual service record. You must use the select radio button in order to delete a service record from the services page.

5.6.4.2   Recommended Service Category

The recommended service category field **Recommended Service Category*** Assisted Applying for Gov. Financial Assistance is not enterable. This field will display the recommended service category that was selected on the add page.

5.6.4.3   Recommended Service

The recommended service field **Recommended Service*** Social Security is not enterable. This field will display the recommended service that was selected on the add page.

5.6.4.4   Action Taken

The action taken field **Action Taken** Implemented-Lack of Resources will display the action taken that was selected on the add page. Once a service has been added, the action taken can be entered or modified directly on the services page.
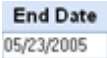
5.6.4.5   Comments

The comments box **Comments** is a free-form text box. This box will display comments that were entered on the add page. Once a service has been added, the comments can be entered or modified directly on the services page.
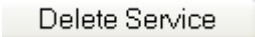
5.6.4.6   Start Date

The start date field **Start Date*** `05/25/2005` will display the start date that was entered on the add page. Once a service has been added, the start date can be modified directly on the services page. You may initially enter a recommended service with an action taken of "accepted" and the date the service was accepted by the client. At a later date, the service may actually be "implemented" and the start date could be changed to identify when the service actually began.
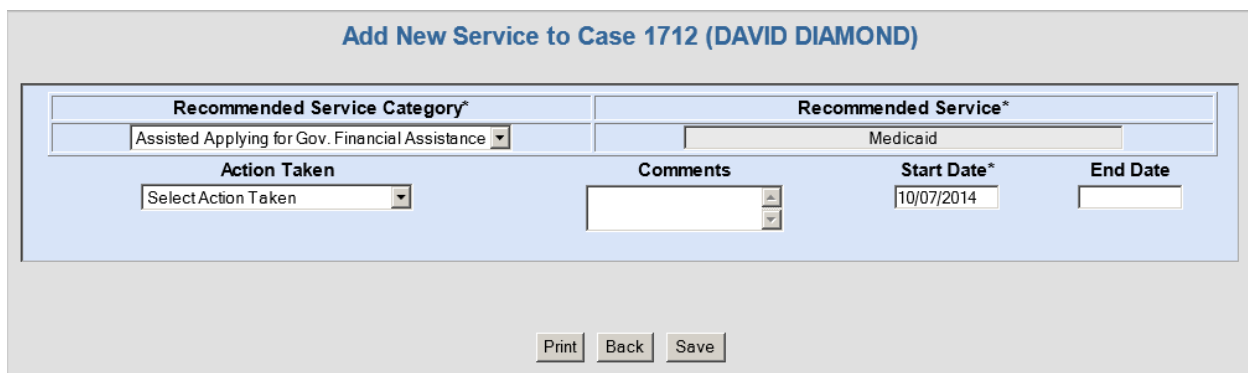
5.6.4.7   End Date

The end date field **End Date** `05/23/2005` will display the end date for the recommended service. The end date can be entered on the add page, but once a service has been added, the end date can also be entered or modified directly on the services page.

5.6.4.8   Delete Service Button

Clicking the **Delete Service** button will delete the selected service from the services page. Before clicking the delete service button, you must first select a service by clicking the appropriate select radio button.

5.6.4.9   Add Service Button

Clicking the **Add Service** button will take you to the add page for recommended service information. The 'add new service' page looks like this:
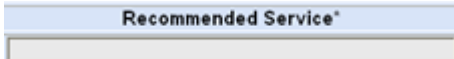

5.6.4.9.1   Recommended Service Category

You can use the recommended service category drop down list to select the recommended service category for the service.

5.6.4.9.2   Recommended Service

The recommended service field **Recommended Service*** is not enterable. When a recommended service category is selected from the recommended service category drop down list, a page will display listing the valid services for the selected category.

The page that will display looks like this (this is an example of the service list for the category of "Assisted Applying for Gov. Financial Assistance"):

Click your mouse in the radio button in front of the desired service (this will highlight the selection, as shown above) and then click the Select button. This will add the selected service to the add new service page. Clicking the Cancel button will take you back to the add new service page, but a service will not be selected. Clicking the Print button will print the service list.

5.6.4.9.3   Action Taken

You can use the action taken drop down list Action Taken Implemented-Lack of Resources ▾ to select the appropriate action taken for the service.
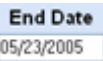
5.6.4.9.4   Comments

The comments box Comments [   ] is a free-form text box where you can enter general comments regarding the recommended service or action taken.

5.6.4.9.5   Start Date

The start date field Start Date* [05/29/2005] will default the date the service is being entered into the system. You can change the start date to a past date, if necessary.

5.6.4.9.6   End Date

The end date field **End Date** 05/23/2005 is where you can enter the end date for the recommended service. An end date can be entered on the add page if you are entering a service that has already been provided. Once the service has been added, the end date can also be entered or modified directly on the services page.

5.6.4.9.7   Back Button

Clicking the Back button will take you back to the services page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the services page.

5.6.4.9.8   Save Button

Clicking the Save button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the 'add new service' page so you can enter another service, if necessary. If you do not need to add another service, click the Back button to return to the services page.

5.6.4.10   Print Button

Clicking the Print button will print the services page. A print window will open where you can confirm your print details. If everything is correct, click the Print button on the print window. Click the Cancel button on the print window if you do not wish to print the services page.

5.6.4.11   Back Button

Clicking the Back button will take you back to the case management page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.6.4.12   Save Button

Clicking the Save button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

5.6.5   MEDICAID BUTTON

Clicking the [Medicaid] button will take you to the Medicaid services page. The Medicaid services page looks like this:

NOTE: Either the client's Medicaid number **or** Social Security Number must be entered in order to add Medicaid services.

5.6.5.1   Medicaid Number

The Medicaid number field [Medicaid Number 123456] is where you can enter the client's Medicaid number (if known).

5.6.5.2   Social Security Number

The Social Security Number field [Social Security Number] is where you can enter the client's social security number. If the SSN was entered on the person detail page, the system will default the SSN into this field.

5.6.5.3   Montana Medicaid Provider Web Portal Link

Clicking the Montana Medicaid link [www.mtmedicaid.org] will open another browser window and display the internet page for the Montana Medicaid Provider Web Portal. The Web Portal will enable you to perform Medicaid and MHSP eligibility and claims status queries. You must download, print and complete an access request form. For additional assistance with the Web Portal, contact the DPHHS Help Desk at 444-9500.

5.6.5.4   Select Radio Button

The select radio button [○] is used to select an individual Medicaid service record. You must use the select radio button in order to delete a Medicaid service record from the Medicaid services page.
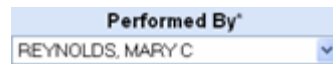
5.6.5.5   Service

The service field [Assistance in Applying for, and Using Medicaid ▼] will display the Medicaid service that was selected on the add page. Once a Medicaid service has been added, the service can be modified directly on the Medicaid services page.

5.6.5.6   Description

The description field [ ] is a free-form text box. This box will display comments that were entered on the add page. Once a Medicaid service has been added, the comments can be entered or modified directly on the Medicaid services page.

5.6.5.7   Performed By

The performed by field [REYNOLDS, MARY C ▼] will display the name of the worker that was selected on the add page. Once a Medicaid service has been added, the performed by field can be modified directly on the Medicaid services page.

5.6.5.8   Time Worked

The time worked field [2] will display the time worked that was entered on the add page. Once a Medicaid service has been added, the time worked can be modified directly on the Medicaid services page. Time worked must be entered in minutes.

5.6.5.9   Start Date

The start date field [05/25/2005] will display the start date that was entered on the add page. Once a Medicaid service has been added, the start date can be modified directly on the Medicaid services page.

5.6.5.10   End Date

The end date field [05/23/2005] will display the end date for the Medicaid service. The end date can be entered on the add page, but once a Medicaid service has been added, the end date can also be entered or modified directly on the Medicaid services page.

5.6.5.11   Delete Medicaid Service Button

Clicking the [Delete Medicaid Service] button will delete the selected Medicaid service from the Medicaid services page. Before clicking the delete Medicaid service button, you must first select a service by clicking the appropriate select radio button.

5.6.5.12 Add Medicaid Service Button

Clicking the [Add Medicaid Service] button will take you to the add page for Medicaid service information. The add Medicaid service page looks like this:

NOTE: Medicaid services should continue to be tracked every two weeks (according to policy). Multiple occurrences of the same service during any reporting period can be combined into one entry, with specifics entered in the description box. Total hours can then be entered in the TIME WORKED field.
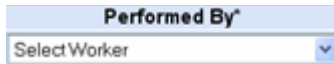
5.6.5.12.1 Service

You can use the service drop down list [Select Service] to select the Medicaid service that was provided to the client.
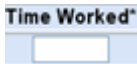
5.6.5.12.2 Description

The description box [ ] is a free-form text box where you can enter additional information for the Medicaid service that was provided to the client.

5.6.5.12.3 Performed By

You can use the performed by drop down list [Select Worker] to select the name of the APS worker that performed the task on behalf of the client.

5.6.5.12.4 Time Worked

The time worked field [ ] is where you will enter the amount of time that was spent performing the Medicaid service task. Time worked must be entered in minutes.

5.6.5.12.5 Start Date

The start date field [05/29/2005] will default the date the Medicaid service is being entered into the system. You can change the start date to a past date, if necessary.

5.6.5.12.6 End Date

The end date field [05/23/2005] is where you can enter the end date for the Medicaid service. An end date can be entered on the add page if you are entering a service that has already been provided. Once the Medicaid service has been added, the end date can also be entered or modified directly on the Medicaid services page.
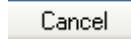
5.6.5.12.7 Back Button

Clicking the [Back] button will take you back to the Medicaid services page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the Medicaid services page.

5.6.5.12.8 Save Button

Clicking the [Save] button will save the additions you have made to the page. Once the information has been saved, you will receive a confirmation message. You will remain on the add Medicaid service page so you can enter another Medicaid service, if necessary. If you do not need to add another Medicaid service, click the [Back] button to return to the Medicaid services page.

5.6.5.13 Print Button

Clicking the [Print] button will print the Medicaid services page. A print window will open where you can confirm your print details. If everything is correct, click the [Print] button on the print window. Click the [Cancel] button on the print window if you do not wish to print the Medicaid services page.

5.6.5.14 Back Button

Clicking the [Back] button will take you back to the case management page. If you have made any changes to the page, you will receive a message asking if you would like to save the information before returning to the case management page.

5.6.5.15 Save Button

Clicking the [Save] button will save the changes you have made to the page. Once the information has been saved, you will receive a confirmation message.

5.6.6   SAVE CASE MANAGEMENT BUTTON

Clicking the [Save Case Management] button will save any changes you have made to the case management page. You will receive a confirmation message when your changes have been saved.